



Scan2CRM

User Guide



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1. INTRODUCTION

Overview

Scan2CRM is an application that reads business cards, and automatically inputs both their textual data and image to a new contact record in your CRM application, either through the Internet or locally.

Within seconds of placing a card into the scanner, **Scan2CRM** pulls the information off the card using OCR – Optical Character Recognition technology, and automatically populates the text fields of a new contact record in your CRM software (name, title, phone number, etc.), while also capturing an image file of the card.

Scan2CRM works directly with CRM applications, making it the only business card scanning package that does not require cards to be scanned into a 3rd party application before the information can be imported into CRM software.

Features

- Full integration with CRM software - Scans business cards directly and automatically into CRM software
- Capture both data and image
- Just a few seconds per scan
- Auto detect function - just place the card in the scanner

Scanner Specifications

- Powered by the computer USB – No external power source is needed
- Small footprint
- Fully mobile



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2. GETTING STARTED

Before Using the Scanner

The scanner has been carefully packaged to avoid damage during transportation. Before operating the scanner, please remove the packaging materials. After removing the packaging materials, you will find the following:

- ScanShell scanner
- USB interface cable
- Calibration paper
- Cleaning paper
- Cardboard cutout with software download link.

Minimum System Requirements

The minimum system requirements are:

- Pentium IV with 512MB
- USB port
- Microsoft Outlook 2000 or higher installed

Connecting the Scanner

The scanner is connected to the computer via the USB port. To connect the scanner, do the following:

- Place the scanner on a flat, firm, solid surface with easy access.
- Plug the USB interface cable into the USB port of the computer

Installation

To install the software on the computer, do the following:

1. Close all programs.
2. We recommend downloading the program before connecting the scanner.
3. Locate the license key on outside of the box (16 characters)
4. Go to the software download link: <http://autorun.card-reader.com> from the Cardboard cutout insert and type the license key in the box.
5. Install the program after the download has finished, and select the scanner model during the setup.
6. Setup will check if Microsoft .NET framework 1.1 or higher is installed on your computer. If it is not installed, setup will prompt you to install it. Click "Yes" to install Microsoft .NET framework or "No" to skip Microsoft .NET framework installation. Please note that if

CSSN

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Microsoft .NET framework 1.1 or higher is not installed on your computer, you will not be able to install and use *Scan2CRM*.

7. Select your CRM software from the list when prompted.
8. Attach the scanner after setup has finished
9. After the *Add new hardware wizard* dialog box appears, click *Next* to install the drivers automatically.
10. After you specify the driver, click *Next*.
11. You will be presented with a standard Windows message. Note: Scanner model may vary.



Click *Continue Anyway*. The installation of Scanshell scanner drivers is safe for your computer and will not affect your system.

- Click '*Next*' until the installation is complete.

Uninstall

To uninstall the software, open the *Add-Remove Programs* located in the control panel. Select *Scan2CRM* and click on *Add/Remove*. Follow the uninstall instructions until the operation is completed.

3. USING SCAN2CRM

Login






Fill in your user name and password, and select your CRM software from the list.


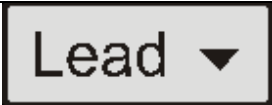
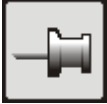
Application Interface

Scan2CRM puts up a small toolbar, which can be dragged and placed anywhere on the screen.



Scan2CRM Toolbar


	Name	Description
	Enable/Disable Scanning.	If enabled and the scanner is connected, inserting a card into the scanner will start the scanning process automatically. Scanning cannot take place if Scan2CRM is disabled
	Green=enabled, scanner is connected Red=disabled, scanner is disconnected	
 	CRM connected CRM disconnected	Press this button to bring up the login window, in which you can select your CRM software and connect to it if it is not connected.
		Open the Configuration Window

	Export data to CRM	Allows the export of data that was scanned in offline state to the CRM software when in online state.
	Contact type selection	Allows selection of contact type according to the options of the selected CRM application.
	Always on top	If pressed, the Scan2CRM window remains visible at all times.

Scanning cards

Working online

When working online, **Scan2CRM** is connected to the CRM software, which can be either an Internet/Intranet CRM application displayed in a browser, or locally installed accessed through the network.

1. Make sure the scanner is enabled  (The Enable button is green meaning the application is enabled and the scanner is connected). Otherwise press on the button, select your CRM application and connect).
2. Insert a card into the scanner. The card will be scanned automatically and the following window containing the scanned data will open:

New Contact

Contact Information

Contact Owner: _____
Account: _____
Title: Director of Product Management
Department: _____
Birthdate: _____
First Name: Mr. | John
Last Name: Smith
Reports To: _____
Lead Source: _____

Phone: _____
Home Phone: _____
Mobile: _____
Other Phone: _____
Fax: +1-800-3-6474 1 04
Email: Jo@sunaid.com
Assistant: _____
Asst. Phone: +1-800-3-7674806

Address Information

Mailing Street: _____ Other Street: _____
Mailing City: _____ Other City: _____
Mailing State/Province: _____ Other State/Province: _____
Mailing Zip/Postal Code: _____ Other Zip/Postal Code: _____
Mailing Country: _____ Other Country: _____

Additional Information

Languages: _____ Level: _____

Description Information


Description: _____

Scanned data window

3. You can edit details and add more details in empty fields.
Note: Fields marked in red must be filled in. The layout and mandatory fields can change according to the CRM system or individual configuration.
4. Click OK to save the record. The record will be saved automatically in your CRM Software. If you selected "Open the scanned card in the CRM application" option in the program settings (see *Application Configuration, CRM, page*), the new record will be displayed in your CRM application. If this option is not selected, the record will be silently saved in your CRM application in the background.
Note: If you use Internet-based CRM software, it does not have to be opened in the internet browser. The data transfer will take place silently in the background.

4. APPLICATION CONFIGURATION

CRM

To open the application settings, press the  Configuration button

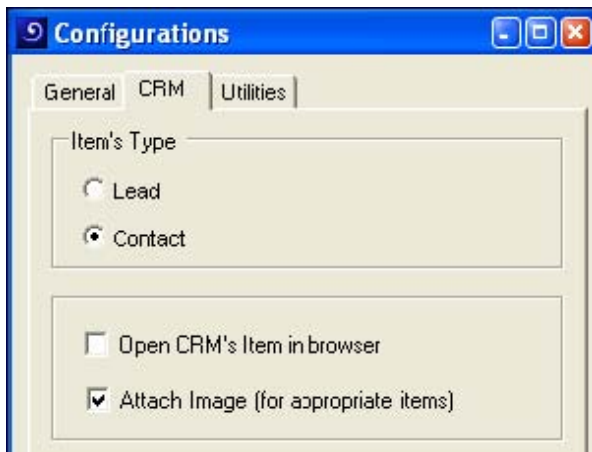
Configurations → **General tab**

Card Type → **Business card** – The scanned card will be handled as a Business card.

Configuration → **CRM tab**

This window allows you to configure the selected CRM application's specific parameters.

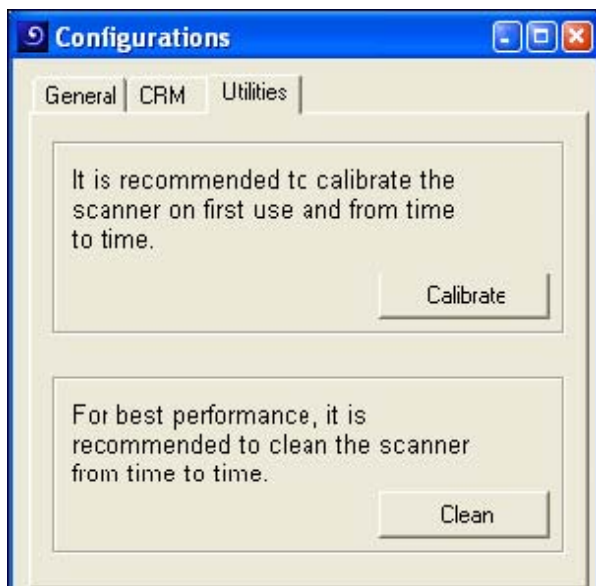
Note: *The options available in the CRM section change according to the CRM application you select when starting the program.*



Salesforce CRM

- **Item Type** – Select either Lead or Contact.
- **Open scanned card in the CRM application** – Check this option to have the scanned card opened in the CRM software automatically after saving. If unchecked the record will be save silently to the CRM software.
- **Attach image** – Allows you to attach the image of the card to the record (only in the case of contacts).

Utilities



Configuration → **Utilities tab**

Scanner Calibration

Scanner calibration resets the scanner color sensor and generates higher accuracy in the OCR detection process. When you use the scanner for the first time, you will be prompted to calibrate the scanner. Calibrating the scanner is also a good idea if you notice deterioration in scanning and OCR quality.

- Insert the calibration paper that came with the scanner into the scanner.
- Click the 'Calibrate Scanner' button.

Note: The scanner **must** be calibrated before the first use

Cleaning the scanner

It is recommended to clean the scanner from time to time, especially if you notice irregularities and deterioration in scanning and OCR quality.

- Insert the cleaning paper that came with the scanner. You can add a few drops of alcohol or cleaning solution to the cleaning paper.
- Click the 'Clean Scanner' button.

5. APPENDIX A: TROUBLESHOOTING

Problem: When I try to enable Scan2CRM I get an error message, which says that another CSSN application is open.

Solution: Scan2CRM will not work while another CSSN application is running. To activate Scan2CRM, disable or close the other application and press on the state button in the toolbar.

Problem: The application CRM Connection State shows that it is *Disabled* on the startup.

Solution: Try to enable the application by pressing on the CRM button and performing login again.

Problem: There are irregularities or deterioration in scanning and OCR quality.

Solution: Clean and calibrate the scanner, see page 14

Problem: After I've logged in, it says the scanner is not connected.

Solution: Make sure the USB connection from the scanner is seated properly.

Problem: Login Must Use Security Token

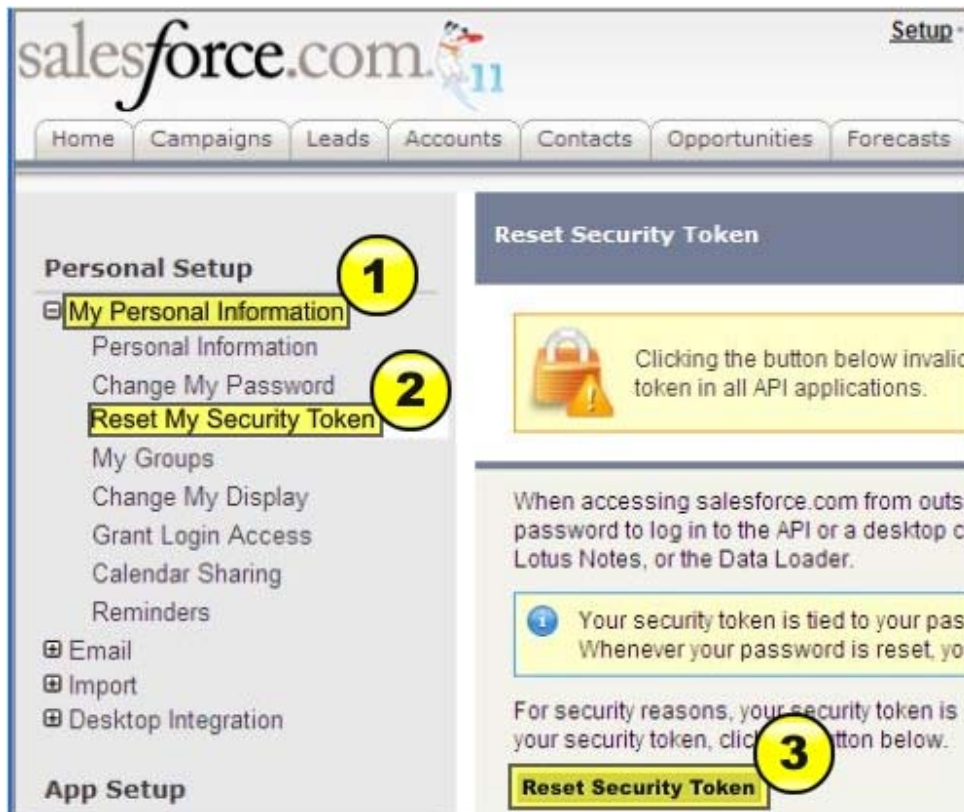


Solution: When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus

Notes, or the Data Loader. You will need to log in to your Salesforce.com account and select Setup->Reset your

The screenshot shows the Salesforce.com interface. At the top right, the 'Setup' link is highlighted with a red box. Below the navigation bar, the left sidebar contains 'Personal Setup' and 'App Setup' sections. The main content area is titled 'Personal Setup' and features a 'My Personal Information' section with a list of options, including 'Reset your security token' which is highlighted in yellow. Below this is an 'Email' section with options like 'Change your outgoing email settings' and 'Create or edit an email template'.

1. Click on the plus sign next to My “Personal Information” to expand
2. Click on Reset My Security Token
3. Click on Reset Security Token



Go back to S2CRM program and paste the security token from your email after your password.

For Example:

If your password = “mypassword”

And your security token = “XXXXXXXXXX”

You must enter “mypasswordXXXXXXXXXX” in place of your password

